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ABSTRACT

This paper gives a brief historical account of Wisconsin's Cooperative Educational Service Agencies (CESA's) and the need for changes, outlines some of the recommendations of a CESA fact-finding task force, and describes the current transition period. The first section describes the background and legislative history of the CESA, followed by an account of its development and setbacks since its origin in 1965. In October 1981, a 22-member task force undertook a year-long study of CESA's, resulting in 22 recommendations. In the second section, 10 of these recommendations are summarized, illustrating the variety of issues covered and rationales used. The third section describes the steps taken in the current transition from 19 CESA's to 12: determining new boundaries; establishing boards of control, policies, and procedures; selecting and orienting CESA administrators; transfer of assets and liabilities to new CESA's; plans for the metro unit; evaluation of CESA's; and school district boundary appeal boards. The fourth section discusses selected issues: revised goals, revised funding, new leadership, and accountability lines. The final section addresses implications for the future. (TE)

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COOPERATIVE EDUCATIONAL SERVICE AGENCIES: THE WISCONSIN EXPERIENCE[1]

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Wisconsin Department of Public Instruction

April 4, 1984

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2. Judson A. Harmon has been an evaluation consultant with the Wisconsin Department of Public Instruction since 1976 and assisted the CESA task force in 1981 and 1982. B. Dean Bowles, currently on leave from the University of Wisconsin-Madison, is Wisconsin's deputy state superintendent of public instruction.

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Wisconsin's Cooperative Educational Service Agencies (CESAs) are currently undergoing a number of changes. This paper will give a brief historical account of Wisconsin's CESAs and the need for changes, outline some of the recommendations of a CESA fact-finding task force, and describe the current transition period.

A. HISTORY

From 1861 to 1965, Wisconsin's only intermediate educational agencies were county superintendencies whose function was the supervision and regulation of the thousands of small, rural, K-8 districts in the state. Under an 1863 law, city school districts were independent of the county agencies. In the 1950's and early 1960's, the growth of the city districts and the decrease, by consolidation, of the number of small K-8 districts eroded the geographic base of the county agencies. Further, these agencies did not provide the many, important programs and services that were provided by intermediate educational agencies in other states. It was clear that a new kind of intermediate agency was needed.

In 1965 the Wisconsin legislature created and started funding the administrative operations of 19 CESAs ". . . as a convenience for school districts . . . " to provide a variety of services which were so specialized or so low in incidence that they could only be provided by Wisconsin's large districts or in some cooperative fashion.

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The newly-formed CESAs grew and prospered, serving their member districts in accord with local needs. The total, statewide dollar amount of shared services (such as special education, data processing, and cooperative purchasing) increased from $12,048,960 in 1971-72 to $40,316,600 in 1981-82, which is an increase of 49 percent in constant dollars. They were most heavily used and most highly valued by Wisconsin's small and mid-sized districts.

Yet not all was well in the CESAs. While some boldly developed new programs and services, others either hung back or were prevented from making advances. Some of the CESAs that made the boldest changes eked out a financial profit and achieved a degree of independence from their member districts. Questions arose regarding the competence, mission, accountability, governance, and, finally, the value of some CESAs. Some districts stopped participating with their own CESA and purchased services from other CESAs. CESAs tended to evaluate their own programs and services after the fact by simply noting how many districts continued to participate. As a result, those CESAs with problems could seldom rectify them in time to do any good. Further, each CESA had an Agency School Committee (ASC) that heard and resolved appeals by property owners for changes in district boundaries which had not been satisfied by the two districts involved. This function of the ASCs sometimes caused bitterness and tended to disrupt the CESA's cooperative activities.

In Wisconsin, the office of the chief state school officer is an elected, non-partisan office. In 1980 and 1981, when running for that office, our current state superintendent of public instruction, Herbert J. Grover, promised to review Wisconsin's CESAs in terms of their success and effectiveness and to effect changes where and if necessary.

In early 1981, a time of scarce money, Wisconsin's governor, Lee Sherman Dreyfus, left the budget line for the CESAs blank, that is, un-funded. The idea was that the state had really been keeping CESAs afloat with funds for general administration for almost 15 years and that if they had been useful to Wisconsin's schools, the schools should be willing

to provide the necessary funds. The outcry from schools reached the state legislature and administrative funding was restored at $25,000 per CESA per year, at which level it has been for the past three years. The amount had been nearly $50,000 prior to 1981.

In October, 1981, three months after taking office, Superintendent Grover commissioned a 22-member task force to make a year-long study of CESAs, assessing current operations, determining districts' needs for such agencies, and recommending changes as needed to improve CESAs' provision of services to districts. The task force held public hearings and gathered considerable information from the school districts, the CESAs, and other sources. It submitted its final report, including 24 recommendations, to Superintendent Grover on November 9, 1982. Several of those recommendations are reported in a later section of this paper.

Superintendent Grover made his recommendation to the Wisconsin legislature and that body revised or created various statutes and provisions regarding CESAs in the 1983 session. Foremost among these were the following:

- The state superintendent was authorized to adopt rules and procedures for the reorganization of the 19 CESAs into 12 CESAs, effective July 1, 1984, and to approve CESA agency evaluations.
- The state would provide $25,000 for the administration of each CESA for the 1983-84 school year and $50,000 annually thereafter, to be matched by member school districts on the basis of their average daily memberships.
- Each CESA's board of control (BOC) was to have no more than 11 members and they would be elected for staggered 3-year terms.
- Provisions were made for the distribution, consolidation, or assignment of the existing 19 CESAs' assets and liabilities among the 12 new CESAs.

It should be noted that skepticism about the value and viability of CESAs crossed party lines with Wisconsin's new governor, Anthony Earl, who included these provisions in his budget only after some vigorous convincing by Superintendent Grover.

Since the summer of 1983, Wisconsin's CESAs have been in transition, as will be described in the third section of this paper.

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B. CESA TASK FORCE FINDINGS AND RECOMMENDATIONS

Ten of the task force's 24 recommendations are summarized here, illustrating the variety of issues covered and the rationales used. The first eight recommendations were adopted and are being implemented. The last two were not adopted as stated. While recommendation #9 suggested one boundary committee per CESA, the legislation called for one to serve the entire state. Regarding recommendation #10, CESAs may hold title to real property if their BOCs and member districts vote to allow such arrangements.

1. Since their many programs and services are and will be needed and used, especially by Wisconsin's smaller and mid-sized school districts, and since those programs and services are, in general, highly satisfactory, Wisconsin's CESAs should be continued.

2. Since, among other reasons, board of control (BOC) members are not elected directly by the people for their BOC role, taxing authority for CESAs is not recommended.

3. The BOC members of a CESA should be elected for a staggered, 3-year term, rather than a 1-year term, so as to understand CESAs and to fulfill their responsibilities more fully.

4. Since CESA self-evaluation of its own programs, services, and administration has been rated low by the school districts and since that evaluation function is not specifically assigned to any group, CESAs should carry out a self-evaluation every three years, as approved by the Department of Public Instruction (DPI).

5. CESAs in Wisconsin should continue to employ the "mixed" organizational model which uses elements of the cooperative model, the regionalized state educational model, and the special district model.

6. In order to assure organizationally and financially healthy CESAs, the state should be restructured into a smaller number of CESAs, based on geographical and other criteria.

7. CESAs should have state financial support to help cover the CESA administrator's salary and fringe benefits.

8. Since CESAs should be more accountable to the DPI in their performance of tasks, certain performance standards should be developed for CESA administrators and the DPI should develop financial incentives for CESAs to provide such "core" programs as coordination of curriculum, staff development, vocational education, and special education.

9. The Agency School Committee should be re-named the School District Boundary Committee in order to make its purpose more apparent; in addition, its procedures for dealing with appeals for boundary changes should be revised.

10. If real property is currently owned, that property should be jointly owned by the school districts and title not held in the name of a CESA. A procedure should be developed for the distribution of the assets and liabilities of a CESA in the event of sale or demolition of such property.

C. THE CURRENT TRANSITION FROM 19 CESAS TO 12

During the 1983-84 school year, a number of steps will have been taken to make a smooth transition from 19 CESAs to 12. Most of these steps have already been taken. The state has been involved in all such steps, either with DPI staff members or representative committees assigned to various activities. These activities are given below in the columns at the left, while corresponding activities for the individual CESAs are given in the column at the right.

STATE ACTIVITIES (DPI OR COMMITTEES)	INDIVIDUAL CESA ACTIVITIES
1. Determine New CESA Boundaries	
An appointed committee decided on CESA boundaries and submitted a map in August showing the boundaries of the 12 new CESAs.	
2. Elect and Establish Boards of Control	
DPI developed guidelines and examples for the election of new CESA BOCs and arranged the first annual state superintendent's conference of new CESAs, held on November 28.	Each district appointed one school board delegate to the first annual conference. 11 BOC members for each new CESA were elected for a staggered 3-year term, and they then elected officers.
3. Develop BOC and CESA Administration Policies and Operational Procedures	
DPI staff provided guidelines and examples of such policies and procedures and set up transition teams (one "official" plus "assistants") for each new CESA.	Transition teams met with delegates at the November 28 conference and later with the BOCs, as needed. All new BOC preparatory actions are unofficial and will be moved for approval at first legal meeting. Main items: (a) Select CESA administrator, (b) Determine status of staff and

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service personnel for 1984-85, (c) Decide on location of center and satellites, if any, (d) Plan budget, programs, and services, (e) Have districts sign statements of intent to purchase services.

4. Select an Administrator for Each New CESA by January 15, 1984

Committee submitted recommendations to state superintendent on November 1 on rules for qualifications and procedures for selecting agency administrator candidates. State personnel department advertised the positions and 70 applications were received and screened by committee. Three persons' names were submitted to each new BOC. In two cases, three additional names were submitted to the BOCs.

Each new BOC has selected, appointed, and contracted with one of the candidates for a term of not more than three years. Of the 12 persons that were selected, 9 were former CESA administrators and 3 are new.

5. Administration and Management of the CESA Office

Committee provided directions, explanations, examples, and information as to initiating CESA operations, including (a) Accounting and bookkeeping, (b) Management control system for receipts, expenditures, and space acquisition/allocation, and (c) Various insurances.

6. CESA Educational Service Planning

Committee developed suggestions and guidelines for increasing CESA services to districts, such as (a) Services that are funded or provided by the state, (b) Services for all districts, and (c) Large district services.

7. Transfer or Consolidate Assets and Liabilities of 19 Old CESAs to 12 New CESAs

Committee developed guidelines on: (a) Assignment of real property by ownership shares to school boards that were parties to the purchase of such property, (b) Regional data processing equipment, (c) Contracts, and (d) Proceedings pending.

Cooperation between existing and new BOCs in writing agreements regarding the transfer and the collection of various assets and liabilities.

8. Plans for the Metro Unit

(New CESA 1 includes Milwaukee, Racine, Kenosha, Waukesha, and other large districts that have 31 percent of the state's public school students.)

Committee appointed to research and recommend policies, services, management, and funding so as to construct a workable metro CESA (due May 1, 1984). They are to focus on (a) Programs and services, and (b) Differences in funding from the other CESAs.

9. Evaluation of CESAs

Committee developed guidelines on CESA evaluation for approval by the state superintendent every three years. Main elements are (a) Administrator task completion and evidence of knowledge and skills, (b) Fiscal control, (c) Personnel work performance and program/service costs and benefits.

10. School District Boundary Appeal Boards

A committee divided the state into four areas, each of which has three CESAs. The state has one School District Boundary Appeal Board that will resolve cases which local districts have not resolved. The board will have one regular member and one alternate from each of the four areas. Members will serve staggered two-year terms.

D. SELECTED ISSUES

1. Revised Goals. The original goals of Wisconsin's CESAs have not really been changed, but they have been expanded. Specifically, in the portion of the statutes dealing with CESAs' purposes, the legislature deleted the earlier phrase, ". . . as a convenience for school districts . . ." and substituted " . . . serving as a link among school districts and between districts and the state . . . CESAs may provide leadership and coordination services for districts, such as (examples) . . ."

2. Revised Funding. Starting on July 1, 1984, the state will provide $50,000 per CESA each year to be used for general administrative operations and for matching the administrative portions of certain federal monies. This amount is to be matched by the member districts, with amounts to be based on their various average daily memberships.

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3. New Leadership. The 12 CESA administrator positions were filled by nine former CESA administrators and three new people, which represents a reasonable amount of change in leadership at the CESA level. Other changes were in the CESA boards of control (BOCs) where the procedures of electing BOC members, their number, and their term of office were revised.

At the state level, the DPI had relatively little influence on CESA operations until 1979 when new legislation said that the DPI would audit, advise, and consult. Prior to that time, the DPI only audited monies which it had sent to the CESAs. With the 1979 and 1983 legislation, the administration of CESAs will be more closely aligned with the DPI in its mission to carry out educational functions in the state.

4. Accountability Lines. As in the past, the CESAs are primarily accountable to their member districts. BOCs and professional advisory councils, made up of the district administrators, have input in policy and procedures. Ultimately, the districts decide whether or not to participate in CESA programs and services, so the CESA must provide programs and services of high relevance, quality, and economy in order to maintain or increase its business. The CESA's self-evaluation, with DPI approval, is aimed at assuring good service to the districts.

E. WHAT LIES AHEAD?

This is a turning point for Wisconsin's CESAs. During the 1983-84 school year, a number of significant changes will have been made in almost all aspects of the agencies. Those changes were based upon information from all quarters and were formulated by representatives of all elements of public elementary and secondary education. The Wisconsin Department of Public Instruction views CESAs as valuable partners in the pursuit of excellence in all Wisconsin schools. Superintendent Grover has pressed for improvements in CESAs and for the financial support that is a key to their continued

success. While Wisconsin's CESAs have been trimmed and re-fitted to sail the stormy seas of cooperative educational service, they still have to serve two masters, the Wisconsin legislature and their area member districts. Those masters will want to see increased profits in the form of new services, higher quality of service, and decreased costs. It seems that the real challenge and adventure is about to begin.

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